

Request for Proposals

Bay Area Stormwater Management Agencies Association (BASMAA)



**Urban Greening Bay Area
Consultant Services**

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Attachment A: BASMAA's Standard Agreement for Professional Consultant Services

Introduction

The Bay Area Stormwater Management Agencies Association (BASMAA) is pleased to announce this Request for Proposals (RFP) to provide organization, facilitation, design, and implementation consultant services as part of the *Urban Greening Bay Area* grant project. Region IX of the Environmental Protection Agency (EPA) awarded Water Quality Improvement Funds (<https://www.epa.gov/sfbay-delta/sf-bay-water-quality-improvement-fund>) to the Association of Bay Area Governments (ABAG), a joint powers agency acting on behalf of the San Francisco Estuary Partnership (SFEP), a program of ABAG. In turn, BASMAA is a member of the team headed by SFEP that was awarded the grant.

BASMAA is taking the lead on two of the grant project tasks – a Regional Green Infrastructure Roundtable process and a Design Charrette. The term of the *Urban Greening Bay Area* grant project is July 1, 2015 to June 30, 2018, with the Regional Roundtable and Design Charrette tasks scheduled for May 2016 to May 2018. The budgets for consulting services on the Regional Roundtable and Design Charrette tasks are \$80,000 and \$70,000, respectively, for a total of \$150,000.

Given the services requested are multi-disciplinary and there is a team / collaborative approach to many of the tasks, BASMAA encourages respondents to consider proposing as part of a team.

Background

Urban Greening Bay Area is a large-scale effort to re-envision Bay Area urban landscapes to develop stormwater-friendly dense, green urban infrastructure (GI) that addresses challenges associated with climate change, infiltrates or captures stormwater and pollutants near their sources, and in turn, promotes improved water quality in San Francisco Bay. Given Bay Area population growth projections from seven to nine million people by 2040, on-going environmental impacts of chemical products (past, present, and future), and continuing competition for reliable, safe drinking water, the challenge facing the region is how to accommodate these prospects while protecting water quality. Increasingly, distributed management of stormwater runoff using GI is considered the multi-benefit solution that can best address stormwater quality and quantity concerns, while providing myriad ancillary benefits.

Consisting of three elemental tracks, **Planning, Implementation, and Tracking**, the project channels the resources of local, regional, state, and federal partners to build regional capacity for long-term and effective GI. The **Planning Element** includes: 1) upgrading and enhancing the watershed-based GreenPlan-IT tool, 2) integrating GI into local planning efforts in various partnering jurisdictions, and 3) conducting a roundtable process to develop a road map for integrating GI with future climate change and transportation investments in the region. The **Implementation Element** includes: 1) a design charrette to develop cost-effective GI designs for typical roadway intersections, with construction of up to three GI projects based on the winning designs, and 2) construction of the Chynoweth Avenue Green Street Project in San Jose. The **Tracking Element** includes

the development and trial of a GIS database and interactive map of constructed GI/LID projects in the region.

Project Scope, Schedule, and Budget

Below is the project scope of services, schedule, and budget for the Regional Roundtable task (Task 2 of BASMAA's scope).

Task 2 – Regional Roundtable

Organize and staff a two year Green Infrastructure Roundtable process, with work groups as needed, to identify and develop a list of recommendations for integrating green infrastructure and stormwater management funding and investments with future climate change and transportation investments within the region. The Roundtable will include convening up to 12 meetings with local, regional, and state stakeholders, agencies, elected officials, and staff to produce draft and final task reports that will identify and recommend possible legislative fixes, agency agreements, consolidated funding mechanisms, and other means and actions as appropriate. The Roundtable is envisioned as a two year effort using innovative participatory processes that will include key experts, regulators, decision-makers, and other stakeholders to share information, solicit and discuss ideas and solutions, and to identify next steps (i.e., a roadmap), which will be summarized in the draft and final task reports.

- **Task 2a: Planning** – Build a task team of BASMAA, SFEP, US EPA, the San Francisco Bay Regional Water Quality Control Board (Regional Water Board), and municipal representatives, as appropriate, to further identify goals, desired outcomes, meeting formats, schedule, and Roundtable participants. Prepare a project briefing sheet, including statement of purpose and summary of tasks and schedule, fact sheets, or other outreach information to help introduce the task to key stakeholders and encourage participation. Conduct informational interviews as an initial step to assist in designing the Roundtable process, and prepare interview summaries. Prepare a Draft and Final Roundtable Strategy that describes the approach and plan for conducting Task 2.

In addition to the task team, an advisory team may be established of high-level stakeholders that may be key to achieving task goals (see Task 2c). Schedule meeting locations and dates. Identify and subcontract with partners and technical experts, as appropriate. Develop a list of key experts, regulators, decision-makers, and other stakeholders to invite to the various Roundtable meetings and send out invitations.

- May – September 2016
- \$10,000
- Outreach Information, Due June 30, 2016
- Roundtable Strategy Outline, Due June 30, 2016
- Interview Summaries, Due July 31, 2016
- Draft Strategy, Due July 31, 2016
- Final Strategy, Due September 30, 2016

- **Task 2b: Roundtable Meetings** – Convene up to 12 meetings with key agency stakeholders, interested environmental/policy organizations, and technical experts. The meeting presentations and discussions will be summarized in the draft and final task reports that will serve as a roadmap for needed next steps to integrate green infrastructure and stormwater management funding and programs with future climate change and transportation investments in the Bay Area.
 - May – September 2016
 - \$45,000
 - Meeting Agendas, Meeting Summaries, and Lists of Meeting Attendees

The goals of the meetings are to:

- Educate participants on the drivers for a long-term distributed green infrastructure approach for meeting stormwater regulatory requirements;
 - Illustrate the challenges in funding such an approach strictly from a stormwater perspective, with a particular emphasis to:
 - Quantify the numerous green infrastructure benefits beyond water quality improvement;
 - Demonstrate the ways green infrastructure can be effectively integrated with active transportation investments intended to achieve greenhouse gas emission reductions and climate change adaptation;
 - Highlight the current barriers and challenges to such an integrated approach from the perspective of planning, design and implementation; and,
 - Develop recommendations on how to effectively integrate green infrastructure with these future transportation and stormwater management infrastructure investments.
- **Task 2c: Expert Input** – Identify key experts knowledgeable about green infrastructure, stormwater management, and climate change and transportation funding and investments. Work with experts on quantification of benefits and innovative finance, including identification of tools. Solicit experts to participate in appropriate Roundtable meetings/forums to apply their expertise and help problem solve particular issues key to achieving task goals.
 - May 2016 – March 2018
 - \$5,000
 - **Task 2d: Roundtable Report** – Draft a comprehensive report on Task 2, including a roadmap for integrating green infrastructure and stormwater management funding and programs with future climate change and transportation investments in the Bay Area. The roadmap will identify key policies, documents, legislation, agencies, and specific actions needed to effectively integrate and fund green infrastructure and stormwater management with transportation programs and funding mechanisms. The intended audience includes entities that play a role in implementing solutions, and is expected to include the State legislature, the Metropolitan Transportation Commission, ABAG, the Strategic Growth Council, the Department of Water Resources,

the State Water Board and Regional Water Board, county congestion management agencies, and municipal stormwater management agencies and associations.

- January – December 2017
- \$20,000
- Roundtable Report (i.e., roadmap) Outline, Due March 31, 2017
- 1st Draft Report, Due June 30, 2017
- 2nd Draft Report, Due September 15, 2017
- Final Report, Due November 17, 2017

Below is the project scope of services, schedule, and budget for the Design Charrette task (Task 3 of BASMAA's scope).

Task 3 – Design Charrette

Organize, facilitate, and help coordinate with the cities of Sunnyvale and San Mateo to conduct a Bay Area design charrette to develop cost-effective and innovative “typical” designs for integrating green infrastructure with bicycle and pedestrian improvements at roadway intersections. The overall goal of developing standardized, transferable designs is to make progress in addressing the high cost of design, implementation, operations, and maintenance that inhibits the widespread use of green infrastructure and LID features. The charrette will utilize actual intersection locations in San Mateo and Sunnyvale that are as representative as possible of the common features of road segments that make up intersections found throughout Bay Area cities. Charrette participants will be solicited by BASMAA and will include multiple representatives, including contractors, engineers, landscape architects, plant specialists, and city transportation engineers and planners, and design, construction management, and operations and maintenance staff. Final designs will be constructed at the San Mateo and Sunnyvale locations to verify costs and serve as demonstration projects for other agencies throughout the Bay Area.

- **Task 3a: Charrette Pre-Coordination** – Convene advisory committee of SFEP, BASMAA, US EPA, and San Mateo/Sunnyvale representatives. Purpose of the committee will be to provide advice on design of the charrette. The grant Project Team may serve as the advisory committee on this task.
 - May 2016 – May 2018
 - \$5,000
- **Task 3b: Site Identification** – Coordinate with San Mateo and Sunnyvale staffs to identify intersections in those cities with common features of road segments with a focus on characterizing typical stormwater management and active transportation scenarios, such as parallel vs. angled parking, pedestrian bulbouts, storm drain inlet locations, presence or absence of bike lanes, etc. Estimate the relative frequency of occurrence of the road segment features in Bay Area cities. Summarize the results of this task in a technical memorandum.
 - May – June 2016
 - \$7,500
 - Site Identification Technical Memorandum, Due July 31, 2016

- **Task 3c: Call for Charrette Participants** – Task being conducted by BASMAA.
- **Task 3d: Select Charrette Panel** – Task being conducted by BASMAA.
- **Task 3e: Site Visits/Information Compilation** – Convene charrette participants to tour the San Mateo and Sunnyvale site locations and identify necessary design information to be provided by cities to enable the charrette to proceed. Cities will then compile the necessary information.
 - Information Compilations, Due September 30, 2016
 - May – September 2016
 - \$5,000
- **Task 3f: Design Charrette** – Host a design charrette event, at which participants will be educated on the overall goals and desired outcomes of the process, the group will develop, discuss, and evaluate various design alternatives to identify the most cost-effective integrated solution. Outputs will be transferable design details that can be used by all agencies.
 - Design Details, Due December 30, 2016
 - October – December 2016
 - \$27,500
- **Task 3g: Final Designs Support** – Provide outputs and relevant related information from Task 3f to San Mateo and Sunnyvale. Cities will work with the design charrette team to finalize the designs to 100% designs with necessary plans, specifications, and cost estimates in preparation for bidding.
 - October 2016 – March 2017
 - \$5,000
- **Task 3h: Bidding and Construction** – San Mateo and Sunnyvale will initiate and manage bid processes for the final designs, award contracts to winning bidders, issue notices-to-proceed, and manage construction.
 - April – September 2017
 - \$5,000
- **Task 3i: Charrette Summary** – BASMAA and SFEP will develop an electronic summary for web posting of the charrette results, final designs, photos of constructed projects, and lessons learned. Package and distribute designs and typical details to Bay Area municipal and regional governments to support future planning and implementation efforts.
 - October 2017 – May 2018
 - \$10,000
 - Draft Summary, Due March 30, 2018
 - Final Summary, Due May 31, 2018

- **Task 3j: Outreach** – BASMAA and SFEP will perform outreach to generate interest and participation in the charrette, generate press coverage of the process, final designs, and constructed projects, as well as post-charrette debriefs, potentially through conference or other meeting presentations.
 - July 2016 – March 2017 / April – May 2018
 - \$5,000
 - Introductory Outreach Presentation, Due July 2016
 - Final Outreach Presentation, Due April 2018

RFP Schedule

- RFP release: Tuesday, April 19, 2016
- Proposals due: NOON, Monday, May 16, 2016
- Consultant Selection: Thursday, May 26, 2016
- Notice to Proceed: Friday, May 27, 2016

Submittal Format and Process

Format

Each proposal, exclusive of appendices, shall be no longer than 20 pages, inclusive of all sections below. Each proposal shall include the following sections:

- **Cover letter** – A cover letter transmitting the consultant's proposal for consideration. The cover letter shall describe the consultant's organization, its history, number of years in business, general qualifications and ability to perform the scope of services. The person authorized to negotiate a contract for proposed services with BASMAA on behalf of the organization/team and contractually bind the organization/team shall sign the cover letter. Resumes for the proposed staffing should be provided as an appendix. Consultants will be expected to sign BASMAA's Standard Agreement for Professional Consultant Services (Attachment A). Any exceptions to BASMAA's Standard Agreement for Professional Consultant Services should be noted in this cover letter.
- **Work Plan and Approach** – A proposal for the work being carried out that meets the Project Scope above. Include a description of the reasoning behind and conceptual approach(es) consultant proposes to use in conducting the scope.
- **Staffing Plan and Organizational Chart** – A list and relational chart of the key project personnel who will be working on this project by name, title, duties, and relevant education / experience, including project management and technical staff.
- **Project Experience** – A brief description of past and current projects that demonstrate experience in performing tasks listed in the Project Scope above. References from previous clients for which the consultant performed tasks similar to those required in this study.

- **Cost Proposal** – A cost proposal that shall include all costs associated with the services to be provided, including reimbursable expenses, and a not-to exceed cost. At a minimum, consultant shall identify estimated cost per task and major subtask, labor resources (include names and titles of project staff and project manager), estimated hours to accomplish the tasks and subtasks, assumptions, and contingency amounts, if needed, and a fee schedule with hourly labor rates current to the timeframe of the project. BASMAA reserves the right to remove specific work items to meet budget constraints.

Process

Proposals shall be submitted in electronic format (PDF) only to info@basmaa.org. Late or incomplete proposals will not be considered. Please direct questions about this RFP to BASMAA's Executive Director at info@basmaa.org.

Evaluation and Selection Process

BASMAA will use the following process to evaluate, identify, and select a consultant:

Responsiveness Review

BASMAA will conduct an initial review of proposals to ensure they are responsive to the requirements of this RFP. Any proposal that does not include sufficient information to allow BASMAA to evaluate the proposal in any of the selection criteria below may be considered non-responsive.

Evaluation Process, including selection criteria

Proposals determined to be responsive to this RFP will be evaluated according to the following criteria:

- Understanding of the project and needs of BASMAA
- Organization, reasoning behind, and approach to project's scope
- Proposed work plan
- Project experience and references
- Cost proposal
- Overall quality, clarity, and completeness of proposal

Reserved Rights

BASMAA reserves the right to reject any and all proposals. BASMAA reserves the right to determine a proposal is non-responsive to this RFP and stop the evaluation of such a proposal. BASMAA reserves the right, should negotiations with the top scoring consultant fail, to pursue a contract with the next highest scoring consultant. BASMAA reserves the right to decline to enter into a contract with a consultant for any reason BASMAA, in its sole discretion, determines.

Attachment A:

BASMAA Standard Agreement for Professional Consultant Services

Available upon Request